

## CHECKLIST TO DESIGNATE AREAS OF EVALUATION FOR REQUESTS FOR PROPOSAL (RFP)

MDOT PROJECT MANAGER			JOB NUMBER (JN)	CONTROL SECTION (CS)
DESCRIPTION				
<b>MDOT PROJECT MANAGER:</b> Check all items to be included in RFP  WHITE = REQUIRED GRAY SHADING = OPTIONAL			<b>CONSULTANT:</b> Provide only checked items below in proposal	
Check the appropriate Tier in the box below				
<b>TIER I (\$25,000-\$99,999)</b>	<b>TIER II (\$100,000-\$250,000)</b>	<b>TIER III (&gt;\$250,000)</b>		
			Understanding of Service	
			<i>Innovations</i>	
			<i>Safety Program</i>	
N/A			Organizational Chart	
			Qualifications of Team	
			Past Performance	
Not required As part of Official RFP	Not required As part of Official RFP		Quality Assurance/Quality Control	
			<b>Location:</b> The percentage of work performed in Michigan will be used for all selections unless the project is for on-site inspection or survey activities, then location should be scored using the distance from the consultant office to the on-site inspection or survey activity.	
N/A	N/A		Presentation	
N/A	N/A		Technical Proposal (if Presentation is required)	
3 pages (MDOT Forms not counted) <b>(No Resumes)</b>	7 pages (MDOT Forms not counted)	19 pages (MDOT Forms not counted)	<b>Total maximum pages for RFP not including key personnel resumes</b>	

The Michigan Department of Transportation (MDOT) is seeking professional services for the project contained in the attached scope of services.

If your firm is interested in providing services, please indicate your interest by submitting a Proposal, Proposal/Bid Sheet or Bid Sheet as indicated below. The documents must be submitted in accordance with the latest "Consultant/Vendor Selection Guidelines for Service Contracts" and "Guideline for Completing a Low Bid Sheet(s)", if a low bid is involved as part of the selection process. **Referenced Guidelines are available on MDOT's website under Doing Business > Vendor/Consultant Services > Vendor/Consultant Selections.**

## RFP SPECIFIC INFORMATION

BUREAU OF HIGHWAYS

BUREAU OF TRANSPORTATION PLANNING \*\*

OTHER

THE SERVICE WAS POSTED ON THE ANTICIPATED QUARTERLY REQUESTS FOR PROPOSALS

NO

YES

DATED \_\_\_\_\_ THROUGH \_\_\_\_\_

**Prequalified Services** – See page \_\_\_\_ of the attached Scope of Services for required Prequalification Classifications.

**Non-Prequalified Services** - If selected, the vendor must make sure that current financial information, including labor rates, overhead computations, and financial statements, if overhead is not audited, is on file with MDOT's Office of Commission Audits. This information must be on file for the prime vendor and all sub vendors so that the contract will not be delayed. **Form 5100J is required with Proposal for firms not currently prequalified with MDOT**

**Qualifications Based Selection** – Use Consultant/Vendor Selection Guidelines

**For all Qualifications Based Selections**, the section team will review the information submitted and will select the firm considered most qualified to perform the services based on the proposals. The selected vendor will be contacted to confirm capacity. Upon confirmation, that firm will be asked to prepare a priced proposal. Negotiations will be conducted with the firm selected.

**\*\*For RFP's that originate in Bureau of Transportation Planning only**, a priced proposal must be submitted at the same time as, but separate from, the proposal. Submit directly to the Contract Administrator/Selection Specialist, Bureau of Transportation Planning (see address list, page 2). The priced proposal must be submitted in a sealed envelope, clearly marked "**PRICE PROPOSAL**." The vendor's name and return address **MUST** be on the front of the envelope. The priced proposal will only be opened for the highest scoring proposal. Unopened priced proposals will be returned to the unselected vendor(s). Failure to comply with this procedure may result in your priced proposal being opened erroneously by the mail room.

**For a cost plus fixed fee contract**, the selected vendor must have a cost accounting system to support a cost plus fixed fee contract. This type of system has a job-order cost accounting system for the recording and accumulation of costs incurred under its contracts. Each project is assigned a job number so that costs may be segregated and accumulated in the vendor's job-order accounting system.

**Qualifications Review / Low Bid** - Use Consultant/Vendor Selection Guidelines. See Bid Sheet Instructions for additional information.

For Qualification Review/Low Bid selections, the selection team will review the proposals submitted and post the date of the bid opening on the MDOT website. The notification will be posted at least two business days prior to the bid opening. Only bids from vendors that meet proposal requirements will be opened. The vendor with the lowest bid will be selected. The selected vendor may be contacted to confirm capacity.

**Best Value** - Use Consultant/Vendor Selection Guidelines. See Bid Sheet Instructions below for additional information. The bid amount is a component of the total proposal score, not the determining factor of the selection.

**Low Bid** (no qualifications review required - no proposal required.) See Bid Sheet Instructions below for additional instructions.

## BID SHEET INSTRUCTIONS

A bid sheet(s) must be submitted in accordance with the "Guideline for Completing a Low Bid Sheet(s)" (available on MDOT's website). The Bid Sheet(s) is located at the end of the Scope of Services. Submit bid sheet(s) separate from the proposal, to the address indicated below. The bid sheet(s) must be submitted in a sealed manila envelope, clearly marked "**SEALED BID**." The vendor's name and return address **MUST** be on the front of the envelope. Failure to comply with this procedure may result in your bid being opened erroneously by the mail room and the bid being rejected from consideration.

**PROPOSAL SUBMITTAL INFORMATION**

REQUIRED NUMBER OF COPIES FOR PROJECT MANAGER	PROPOSAL/BID DUE DATE	TIME DUE
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**PROPOSAL AND BID SHEET MAILING ADDRESSES**

Mail the multiple proposal bundle to the MDOT Project Manager or Other indicated below.

MDOT Project Manager

MDOT Other

Mail one additional stapled copy of the proposal to the Lansing Office indicated below.

<b>Lansing Regular Mail</b>	<b>OR</b>	<b>Lansing Overnight Mail</b>
Secretary, Contract Services Div - B470 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Secretary, Contract Services Div - B470 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933
Contract Administrator/Selection Specialist Bureau of Transportation Planning B470 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Contract Administrator/Selection Specialist Bureau of Transportation Planning B470 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933

**GENERAL INFORMATION**

Any questions relative to the scope of services must be submitted by e-mail to the MDOT Project Manager. Questions must be received by the Project Manager at least four (4) working days prior to the due date and time specified above. All questions and answers will be placed on the MDOT website as soon as possible after receipt of the questions, and at least three (3) days prior to the RFP due date deadline. The names of vendors submitting questions will not be disclosed.

MDOT is an equal opportunity employer and MDOT DBE firms are encouraged to apply. The participating DBE firm, as currently certified by MDOT's Office of Equal Opportunity, shall be listed in the Proposal

**MDOT FORMS REQUIRED AS PART OF PROPOSAL SUBMISSION**

**5100D** – Request for Proposal Cover Sheet

**5100J** – Consultant Data and Signature Sheet (Required only for firms not currently prequalified with MDOT)

**(These forms are not included in the proposal maximum page count.)**

# **Michigan Department of Transportation**

## **SCOPE OF SERVICE FOR EXECUTIVE SERVICES**

### **RESEARCH PROGRAM ASSISTANCE and TECHNOLOGY TRANSFER MANAGEMENT SERVICES**

**LOCATION:** Statewide

**WORK DESCRIPTION:** Technical writing and project management services to Michigan Department of Transportation's (MDOT's) Office of Research and Best Practices (ORBP). The consultant will

- A. Plan the research summit
- B. Develop communications
- C. Document revisions to MDOT's Research and Implementation Manual,
- D. Assist MDOT to develop strategic planning and processes for research
- E. Produce a quarterly newsletter.
- F. Assess and report benefits of research implementation.
- G. Assist with developing the program annual report and program documents
- H. Facilitate and support meetings

#### **MDOT PROJECT MANAGER:**

Michael Townley, P.E.  
425 West Ottawa Street  
Lansing, Michigan 48933  
PH: 517-373-7424  
FAX: 517-241-2833  
E-MAIL: [TownleyM@michigan.gov](mailto:TownleyM@michigan.gov)

**GENERAL INFORMATION:** Extensive knowledge and experience with transportation and business processes associated with transportation research is required. ORBP is responsible for communicating MDOT's research processes and findings to internal and external stakeholders and peers. Stakeholders include, but are not limited to, FHWA engineers and staff, MDOT and other state transportation department engineers and staff, university personnel, private consulting companies, and the public.

Familiarity and working relationships with personnel from the Federal Highway Administration (FHWA), American Association of State Highway and Transportation Officials (AASHTO),

Transportation Research Board (TRB), National Cooperative Highway Research Program (NCHRP), and various state transportation research agencies is required. Communications are highly technical in nature and must maintain accuracy and integrity while still being understood by the general public.

**CONSULTANT RESPONSIBILITIES:** Consultant will assist ORBP with the following:

- A. Planning the research summit
- B. Developing communications
- C. Documenting revisions to MDOT's Research and Implementation Manual,
- D. Facilitating the development of strategic planning and processes
- E. Producing a quarterly newsletter.
- F. Assessing and reporting benefits of research implementation.
- G. Developing the program annual report and program documents
- H. Meeting facilitation and support.

These areas will require expertise in the areas of consulting, technical and non-technical writing, project management, research, editing, publication and Web design, graphics, and administrative support.

**A. Research Summit: The Research Summit is a bi-annual meeting of research stakeholders to refine research ideas and highlight research successes and program process.**

- 1. Assist in development of the summit strategy to maximize the available experience in developing the most effective problem statements possible for the department.
- 2. Lead regular meetings of planning team to develop a detailed agenda, objectives, presenter names, documentation format and report-out of sub-sessions to all participants.
- 3. Develop a detailed communication plan for promoting the importance of the summit and their participation to upper management, MDOT staff and customers.
- 4. Develop printable materials and power points for the Research Summit. MDOT will print these materials.

**B. Develop Communications:**

- 1. Design communications tools to raise awareness and appreciation of ORBP activities and plans. Deliverables will be designed in a coordinated fashion to establish a strong identity and brand for ORBP. Deliverables include the following:
  - a. 5 Power Point presentations
  - b. 3 Web conferences
  - c. 2 Annual Program fact folios
  - d. 20 Research Spotlights. These are one page high level summaries of specific research project outcomes to assist with project implementation. Copies of existing spotlight examples of this nature are available on the ORBP website for review.
- 2. Develop communication tools to bring new knowledge into MDOT from regional and national sources such as TRB, NCHRP, other cooperative research programs, AASHTO, and pooled fund efforts, especially those in which MDOT participates. Deliverables include the following:

- a. 5 synthesis reports,
  - b. 2 e-newsletters, and
- 3. Write the content for selected communication tools using appropriate formats, images, charts and graphs for maximum impact. Use results of surveys and interviews of ORBP staff, MDOT management, investigators, and users to gain credibility and provide tailored content.
- 4. Facilitate regular publication and distribution of communication products. Provide draft documents for review and provide final versions that are ready to print and post to the Web site.

**C. Research & Implementation Manual:**

- 1. Update ORBP's Research and Implementation Manual. ORBP has a September 2008 Research and Implementation Manual available on the ORBP web site. This manual will need to be updated to include the new policies and procedures. MDOT will provide direction on areas needing updates and descriptive direction of the content changes that are needed. The consultant will make these changes and deliver digital copies for printing and develop an online version of the manual.

**D. Assist with developing ORBP Strategic Planning and Processes:**

- 1. Review ORBP mission, organizational goals, funding, past and current activities. Identify ways to coordinate the ORBP strategic plan with MDOT's overall department strategic plan.
- 2. Identify pertinent NCHRP reports and information from AASHTO and its Research Advisory Committee related to planning and execution of state DOT research programs.
- 3. Lead a strategic planning process with ORBP staff and others as appropriate to develop the outline of a strategic plan for the office that looks at one-year, three-year and five-year goals.
- 4. Draft the strategic plan for ORBP. Develop appropriate formats for print and online presentation of the plan.
- 5. Develop outreach activities for using the strategic plan to communicate with partners.

**E: Develop an ORBP Quarterly Newsletter:**

- 1. Assist in developing an effective newsletter to facilitate technology transfer and information sharing regarding MDOT's research program and ORBP.
- 2. Interview experts and collect and review technical resources to develop articles.
- 3. Draft the issues for review and provide final versions that are ready to print and post to the Web site.

**F. Assessing and reporting benefits of research implementation:**

- 1. Contact past project managers to investigate implementation progress and outcomes
- 2. Estimate dollars saved, lives saved, and other benefits from research
- 3. Provide 2 summary documents reporting implementation status and outcomes from research projects. Each summary will be completed annually tracking projects for five years after completion.
- 4. Develop 8 individual reports on project of interest highlighting successful implementation projects.

**G. Assist with developing the annual report and program documents**

1. Collect information from MDOT staff for annual reports and program summary documents content. Example annual reports are available on the ORBP website.
2. Draft the documents for review.
3. Provide final versions that are ready to print and post to the Web site.
4. 2 annual reports and 2 program summary documents will be produced. One for each fiscal year.

The consultant and any sub-consultants contracted by the Michigan Department of Transportation must possess a valid license issued by the NRC, or recognized Agreement State.

Failure of any of the above will be found in noncompliance with the contract.

**DELIVERABLES:**

The amount of deliverables will not exceed the tasks below for a two year period.

**A. Research Summit Deliverables**

1. Summit strategy
2. Pre-summit communications plan
3. Post-summit communications plan
4. Executive Summary
5. Printable materials and power points for the Research Summit

**B. Communications**

5. 5 Power Point presentations
6. 3 Web conferences
7. 2 Annual Program fact folios
1. 20 Research Spotlights.
2. 5 synthesis reports,
3. 2 e-newsletters

**C. Research & Implementation Manual**

1. Printable Research & Implementation Manual
2. online manual version

**D. ORBP Strategic Plan**

1. Draft and final strategic plan

**E. ORBP Quarterly Newsletters**

1. Provide 8 draft copies for review
2. Produce 8 final printable and Web post ready versions of four newsletters

**F. Research Implementation Reporting**

1. Provide 2 summary documents reporting implementation status
2. Develop 8 individual reports on project of interest highlighting successful implementation projects.

**G. Annual Report and Program Documents**

1. 2 annual reports
2. 2 program summary documents

## **SCORING CRITERIA:**

Understanding of Service – 30 Points

Describe your understanding of the service to be provided.

Qualifications of Team – 40 Points

Describe your team and the roles of key personnel. Provide resumes for key personnel.

Past Performance – 20 Points

Provide references and examples of similar work performed for other agencies.

Price – 35 Points

CSRT approved formula: Bid/Low Bid \* points assigned

Completed bid sheet required.

Location – 5 Points

Indicate the percentage of work that will be performed in Michigan.

## **MDOT RESPONSIBILITIES:**

- A. Provide copies of materials for the consultant to familiarize themselves with MDOT's research operations, personnel, customers, and objectives.
- B. Schedule and/or conduct project meetings and phone conferences as necessary.
- C. Assist in establishing detailed task outlines, timelines for completion, and milestones for checking progress.
- D. Maintain frequent communications providing guidance, reviews, and approvals as necessary.
- E. Monitor progress of tasks and budget throughout the contract.
- F. Request estimates of cost and issue work orders

## **COORDINATION PROCEDURES**

- A. The MDOT project manager will review any issues. If necessary, the MDOT project manager will contact the Consultant.
- C. Responses to project issues from the Consultant shall be in writing to the MDOT project manager.
- D. The MDOT project manager will request estimates of hours and costs from the Consultant for specific work tasks prior to determining if a work order shall be issued.
- E. The consultant will estimate the number of hours and cost to complete the work described by the MDOT project manager. The Consultant will advise the MDOT project manager in writing of hours, cost, and deadlines for completion for the work.
- F. The MDOT will review estimates of hours and costs and issue work orders with not to exceed costs.
- G. The Consultant will only begin work after a work order is issued and cost will no exceed the amount documented in the work order.



## **CONSULTANT PAYMENT**

Compensation for this project shall be on an **Loaded Hourly Rate** basis. All billings for services must be directed to the Department and follow the current guidelines. The latest copy of the "Professional Engineering Service Reimbursement Guidelines for Bureau of Highways" is available on MDOT's website. This document contains instructions and forms that must be followed and used for billing. Payment may be delayed or decreased if the instructions are not followed.

Payment to the Consultant for services rendered shall not exceed the maximum amount unless an increase is approved in accordance with the contract with the Consultant. Typically, billings must be submitted within 60 days after the completion of services for the current billing. The final billing must be received within 60 days of the completion of services. Refer to your contract for your specific contract terms.

Direct expenses, if applicable, will not be paid in excess of that allowed by the Department for its own employees in accordance with the State of Michigan's Standardized Travel Regulations. Supporting documentation must be submitted with the billing for all eligible expenses on the project in accordance with the Reimbursement Guidelines. The only hours that will be considered allowable charges for this contract are those that are directly attributable to the activities of this project.

The use of overtime hours is not acceptable unless prior written approval is granted by the MDOT project manager. Reimbursement for overtime hours that are allowed will be limited to time spent on this project in excess of forty hours per person per week. Any variations to this rule should be included in the priced proposal submitted by the Consultant and must have prior written approval by the MDOT project manager.

## GENERAL ORGANIZATION INFORMATION

### REQUIRED RESPONDENT INFORMATION

Please provide the following required respondent information. Failure to respond to each requirement may disqualify the respondent from further participation in this RFP.

**RESPONDENT NAME AND ADDRESS:** Provide name, address, principle place of business, telephone number of legal entity with whom the contract is to be written, and the web page address.

<b>Name and Title:</b>		
<b>Address:</b>		
<b>City, State, Zip:</b>		
<b>Phone:</b>	(   )	<b>Facsimile:</b> (   )
<b>Web Page:</b>		

### LOCATION ADDRESS

<b>Address:</b>	
<b>City, State, Zip:</b>	

### ORGANIZATION AND YEAR:

Please provide the legal status and business structure (corporation, partnership, sole proprietorship, etc.) of the respondent and the year the entity was established.

<b>Status:</b>		<b>Year:</b>
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### RFP CONTACT:

Please provide the following information of the respondent's RFP contact:

<b>Name and Title:</b>		
<b>Address:</b>		
<b>City, State, Zip:</b>		
<b>Phone:</b>	(   )	<b>Facsimile:</b> (   )
<b>Web Page:</b>		

### Bid Sheet

All entries on this page must be handwritten in ink or computer generated. This page provides for costs by payment category. This is provided as an example. Priced proposal costs will be required after selection, in accordance with the MDOT Priced Proposal Guidelines ([Guidelines](#)).

Employee Name	Project Role	(%) Time Working on Project	Total Hours	Fully Loaded Hourly Rate	Total Cost
Eg. Mike Brown	Principal Consultant	10%	100	\$85	\$8500

**TOTAL ESTIMATED LABOR:**

\$ \_\_\_\_\_

**ESTIMATED SUBCONSULTANTS:**

\$ \_\_\_\_\_

**ESTIMATED DIRECT EXPENSES:**

(Listed by item at estimated actual cost)

\$ \_\_\_\_\_

**TOTAL BID PRICE:**

\$ \_\_\_\_\_

## COST DERIVATION SHEET

**This is a sample cost derivation sheet.**

All entries on this page must be handwritten in ink or computer generated. This page provides for costs by payment category. This is provided as an example. Priced proposal costs will be required after selection, in accordance with the MDOT Priced Proposal Guidelines ([Guidelines](#)).

### PROJECT DESCRIPTION:

Classification	Person Hours	Hourly Rate	Labor Cost
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**TOTAL ESTIMATED LABOR:** \$ \_\_\_\_\_

**OVERHEAD:** \$ \_\_\_\_\_  
(Total Labor Cost x \_\_\_\_\_ %)

**Facilities Capital Cost of Money:** \$ \_\_\_\_\_

**ESTIMATED SUBCONSULTANTS:** \$ \_\_\_\_\_

**ESTIMATED DIRECT EXPENSES:** \$ \_\_\_\_\_  
(Listed by item at estimated actual cost)

**FIXED FEE:** \$ \_\_\_\_\_  
(Total Estimated Labor + Overhead) x XX%

**TOTAL BID PRICE:** \$ \_\_\_\_\_

*(This bid price should be the same amount as the total bid price on page 1 of 2 of this document.)*